

# Tips to Having a Successful Legislative Visit

## ASSIGN ROLES

*(These roles are flexible based on the number of people in your group, the length of the visit, number of issues you discuss, and who has stories to contribute.)*

**LEADER(S):** Confirms meeting time and location. Introduces the group or, in a small group, allows everyone to do so. Ensures that the visit is on track and that all spokespeople have a chance to speak. Collects business cards from legislative staffer at beginning and leaves the legislative visit folder or materials at the end.

**ISSUE PRESENTER & STORYTELLER:**  
*(Consider a different person for each issue and/or story. We recommend no more than three issues.)*  
Delivers the message, makes it personal (by telling a story/ personal experience), and speaks to why the legislator should act. Makes “the ask” and is prepared to respond depending on the legislator’s position.

**RECORDER:** Fills in the Lobby Visit Report Form and records any questions, commitments made, or follow up requested during the meeting.

### **SUPPORTING ADVOCATES:**

- Sign the office guest book.
- Take pictures of group during visit.
- After the visit, share your experience on social media. *(Find legislator’s Twitter handle/ Facebook page)*
- Write a thank you note.

## SUGGESTED MEETING FORMAT

### **OPENER:**

- Express thanks for taking the time to meet
- Introduce the group (individually, if a small group).
- Provide BRIEF intro to group: who you are, how many you represent.
- Explain purpose of the meeting: to advocate for certain issues or bills.
- Thank legislator for something you appreciated (vote, cosponsorship) if possible.

### **ISSUE PRESENTATIONS** *(use format for each issue):*

- State the problem that must be addressed by policy change.
- State the policy solution and why you support this position.
- Personal story: Share your experiences or perspective.
- State “the ask,” what you want your member of Congress to do.
- Wait for response – be sure to listen!
- Offer to be a resource or to send additional information.

### **WRAP UP:**

- Review comments, commitments, and follow-up requests for each issue.
- Thank legislator/staff for their time; collect business cards from staff.
- Leave your business card or contact information and legislative visit folder or materials that include talking points.

### **DEBRIEF:**

- Meet outside of the building to discuss the visit; help Recorder write down accurate notes.
- Discuss any requests for additional information made by the congressional office; delegate follow-up tasks to the group.
- Assign someone to write thank you notes to everyone you met with and to the legislator, briefly restating your issue messages; if you met with legislative aides, be sure to mention them in letter to legislator.
- Send Lobby Visit Report Form, notes, and questions from the meeting to Lindsay Morris, Grassroots Associate, at [Lindsay@ncjwdc.org](mailto:Lindsay@ncjwdc.org).

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## DO

- DO** be on time and prepared. Arrive early to allow time to get through security and find the room. (Limit jewelry that may set off metal detectors.)
- DO** be prepared to meet with either your elected official or a staff member. Staff-level meetings can be quite meaningful, as staffers are the experts who work closely with members of Congress and track constituent input on issues.
- DO** practice what you want to discuss with the decision maker in advance. Stay on message, stick to your key talking points, and ask specific questions. Decide these questions prior to the meeting.
- DO** share personal stories with your legislator when it will help to convey your message on the issue.
- DO** admit if you don't have an answer to a question. You are not meant to be an expert and may have to follow up later.
- DO** leave materials and information on the issue and your organization with your elected officials.
- DO** thank whomever you meet with at the beginning of your visit and at the end. Follow up the meeting with a thank you note to everyone you met with, briefly re-stating your "asks".
- DO** debrief with your group afterwards to compare impressions of what you heard in order to take accurate notes. Also, discuss what went well, what could have been done better, what questions still need answers, and congratulate yourself for speaking out!

## DON'T

- DON'T** try to introduce everyone if you have a large group. Instead, say where in the district/state your delegates live.
- DON'T** argue with your legislator or the staffer. Make your points politely and stay on message. If needed, agree to disagree.
- DON'T** allow any one speaker or issue to take up all of the time (you might only have 15 minutes). Watch the clock and be prepared to ask if you may move on to another issue.
- DON'T** allow your legislator to hijack your time by focusing on issues that you did not come to discuss (often legislators want to share with Jewish groups just how much they support Israel). Thank them politely for sharing, but take charge by offering, "we are not here to talk about Israel today, but to discuss... ."
- DON'T** make up a response if you don't know an answer. Let the person you are meeting with know you'll get back to them and contact your coalition partners (like NCJW) to follow up if you are unable.
- DON'T** get off message. Focus on a limited number of specific issues. Do not try to add in your own personal issue – it will dilute the effectiveness of your advocacy. Stay on message before, during, and after the visit.
- DON'T** be intimidated by your legislators. As a constituent, you have every right to be there, to educate on your views, and attempt to persuade your elected officials.